



# Customer Survey Detailed Regional Findings

Wave 6

Fieldwork: 19th January to 11th February 2026

March 2026

Version 1

## Far North Queensland

Prepared by  
**veracity**

# Research methodology, sample and reporting

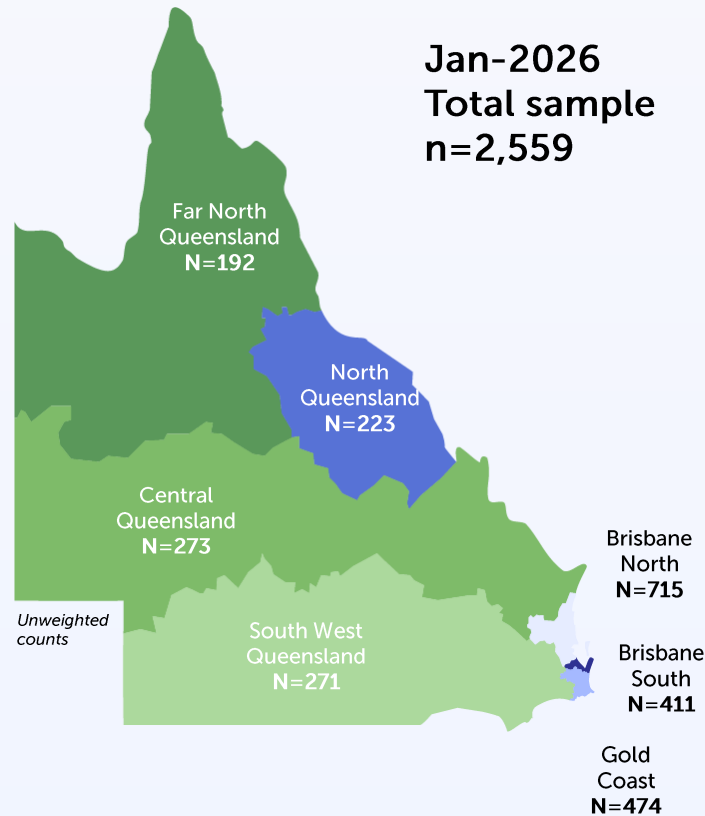
## Fieldwork

From 19<sup>th</sup> January to 11<sup>th</sup> February 2026 we surveyed n=2,559 Queenslanders aged 18 and above to explore their views on recycling and Containers for Change.

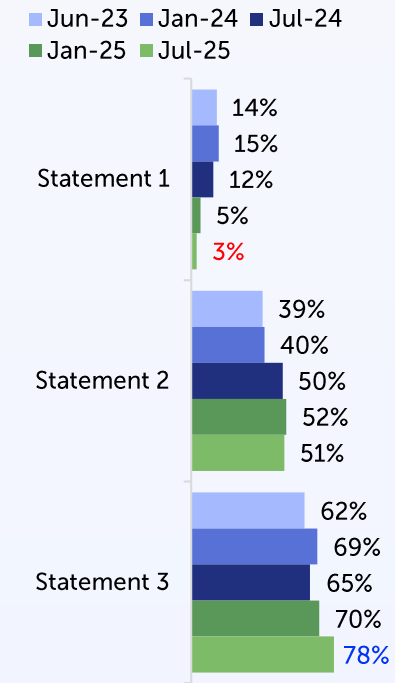
Fieldwork and sampling was sourced via Dynata, as per all previous tracking surveys.

Data weighting: "QLD-wide age x gender" post-weighting to the data, so it fairly represents the views of Queenslanders.

## Sample by Region



## Significant Differences



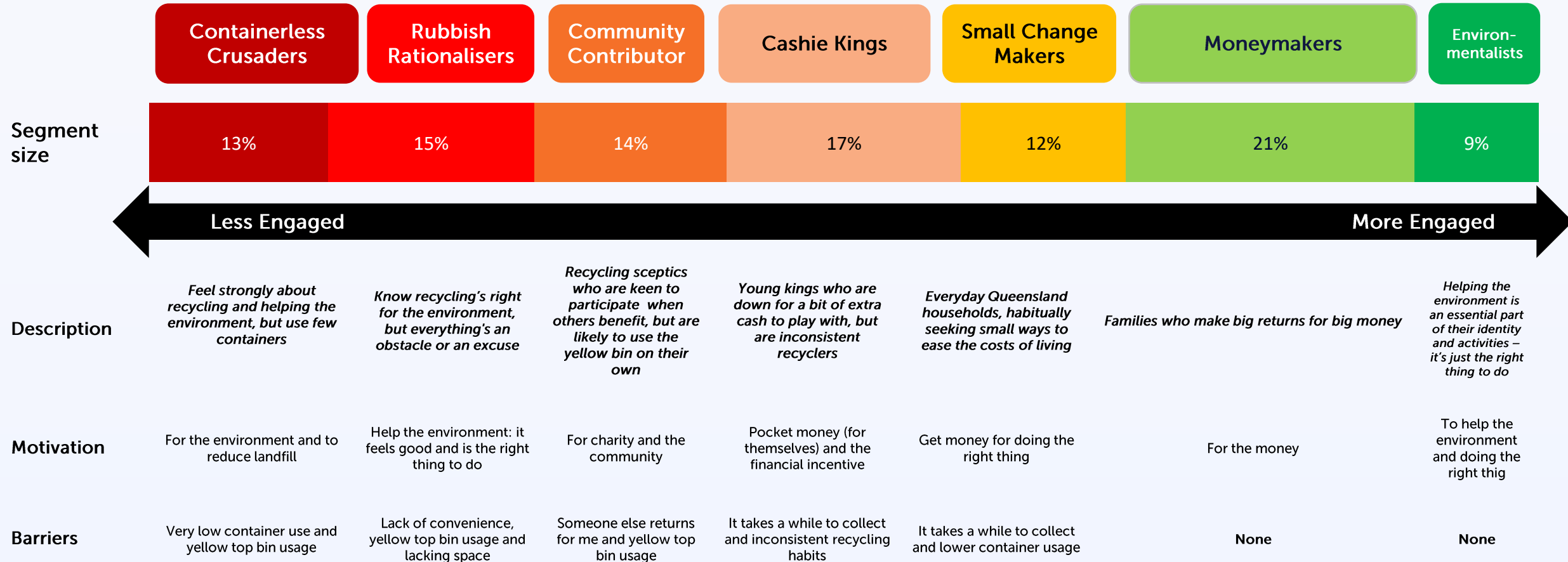
Red or ▼ =  
Significantly less

In this case,  
significantly less  
people agree with  
Statement 1 in Jul-  
25 as compared to  
Jan-25.

Blue or ▲ =  
Significantly more

In this example,  
significantly more  
people agree with  
Statement 3 in Jul-  
25 as compared to  
Jan-25.

# Customer segments



# Key Regional Differences and Changes this Wave



**North Queensland demonstrates high salience & high experience**



**Biggest pain points are in Brisbane South; lowest NPS & satisfaction**

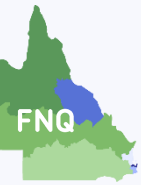


**Biggest drops in NPS & CSAT in Far North and Central Queensland**



**Lowest participation in Brisbane North & Brisbane South**

# Far North Queensland



# Participation remains strong as experience softens in FNQ.

## Participation and awareness are high, in line with QLD average

Participation and brand awareness in Far North Queensland closely mirror the Queensland average, with around four in five residents participating in the scheme and awareness sitting in the low 90%'s. Most participation happens at home rather than through group collection.

## Experience metrics have softened

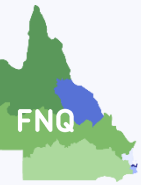
While overall engagement remains stable, Far North Queensland has seen a decline in NPS and customer satisfaction since mid-2024, alongside a gradual dip in trust. This suggests growing friction in the experience despite continued usage – there have been declines in customer service and more CRP issues than previously.

## Environmental motivation leads, logistics limit

Reducing landfill is the strongest motivator for participation, but the biggest barrier is the time it takes to collect enough containers to make a return worthwhile. Storage and messiness also contribute to friction.

## Queues impact CRP experience despite high advocacy

Far North Queensland residents are more likely than average to experience queues at refund points. However, despite these issues, most users still say they would recommend their refund point.



# Key Metrics

Participation and awareness in FNQ is in line with the rest of Queensland.

**75%**

**Participate  
at home**

+2% vs 73%  
Queensland NET

68% collect & return

8% collect but give to others  
to return

**22%**

**Participate  
with a group**

-1% vs 23%  
Queensland NET

2% are responsible for the  
group's participation

20% give containers to the  
group in some way

**93%**

**Aware of the  
brand**

+1% vs 92%  
Queensland NET

**88%**

**Would  
recommend  
the scheme**

+1% vs 87%  
Queensland NET



Prepared by

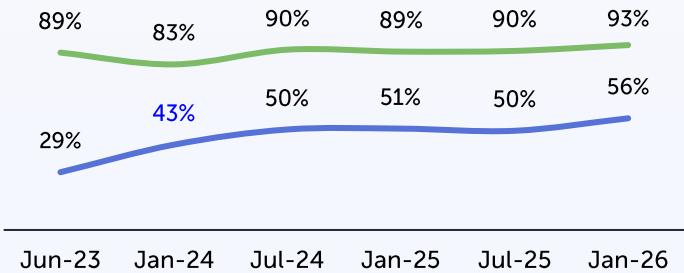
**veracity**



# Key Metrics: Longitudinal Trends

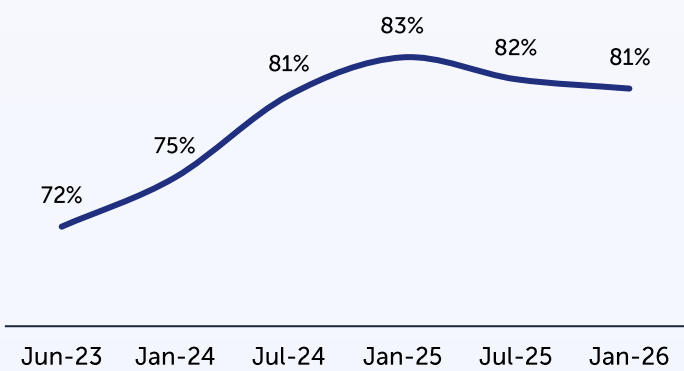
NPS decreased more than expected over summer, and satisfaction significantly. Trust is also trending down.

## Awareness

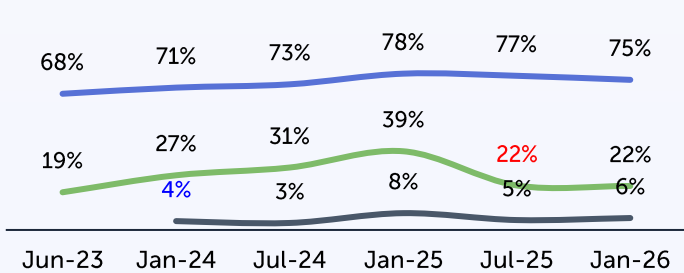


— Spontaneous Brand Awareness  
— Prompted Brand Awareness

## Total Participation

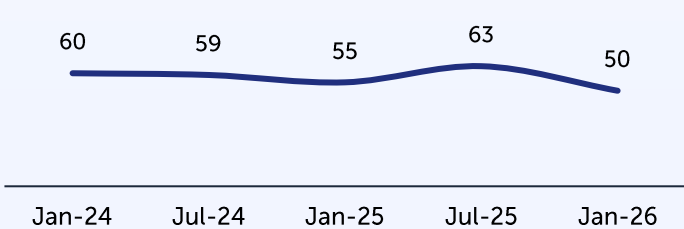


## Participation Types

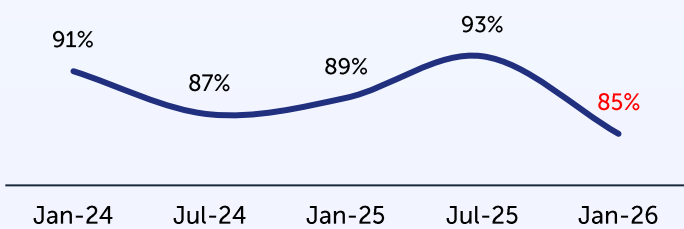


— Indirect Participants — Group Participation  
— At Home Participation

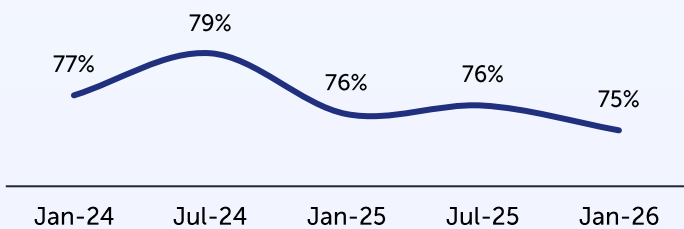
## NPS



## CSAT



## Trust

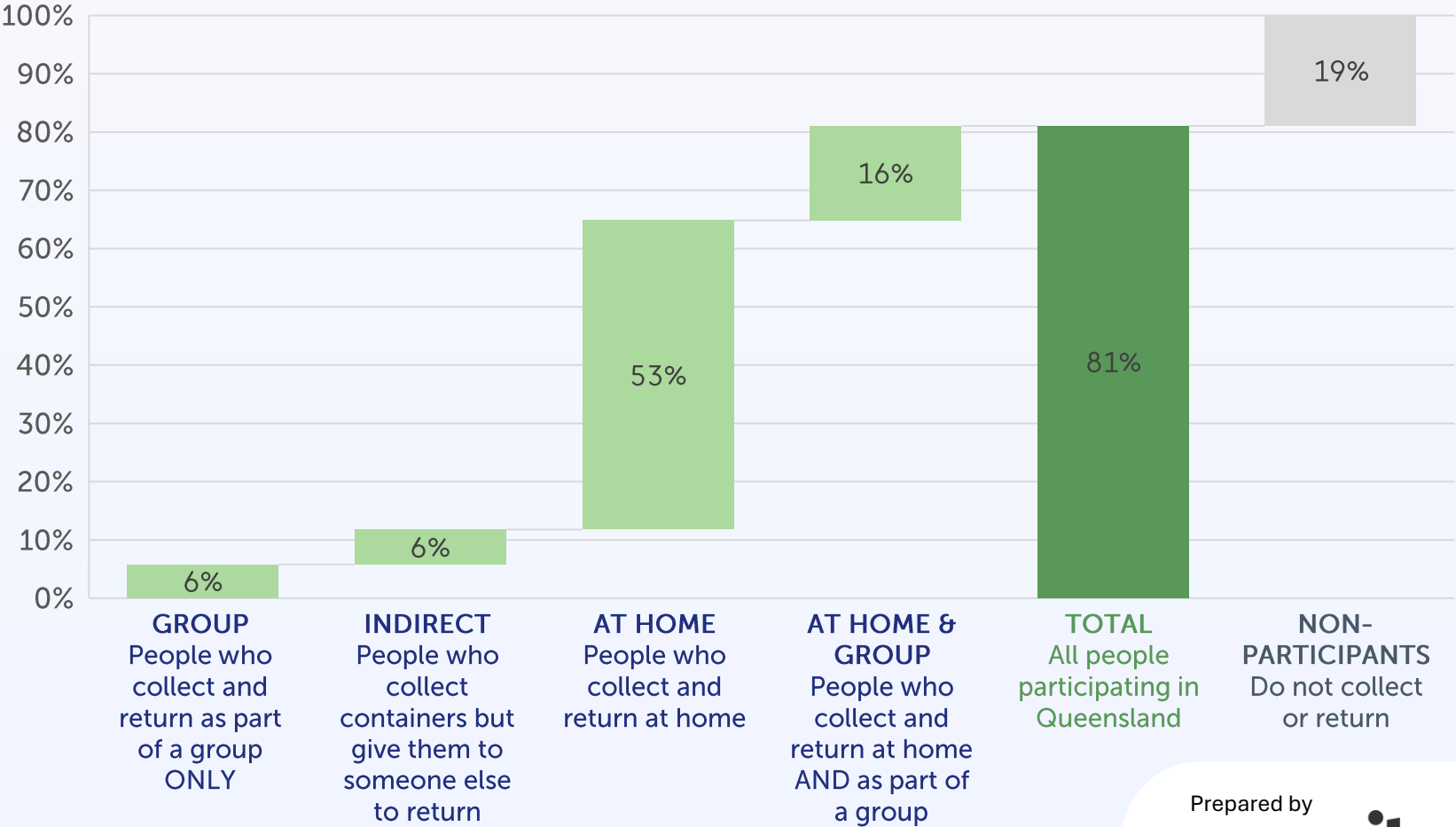




# Participation Breakdown

In Far North Queensland, 4 in 5 people are participating in the scheme. The majority of these are participating as an individual, and not as part of a group. Around 6% of people participate indirectly.

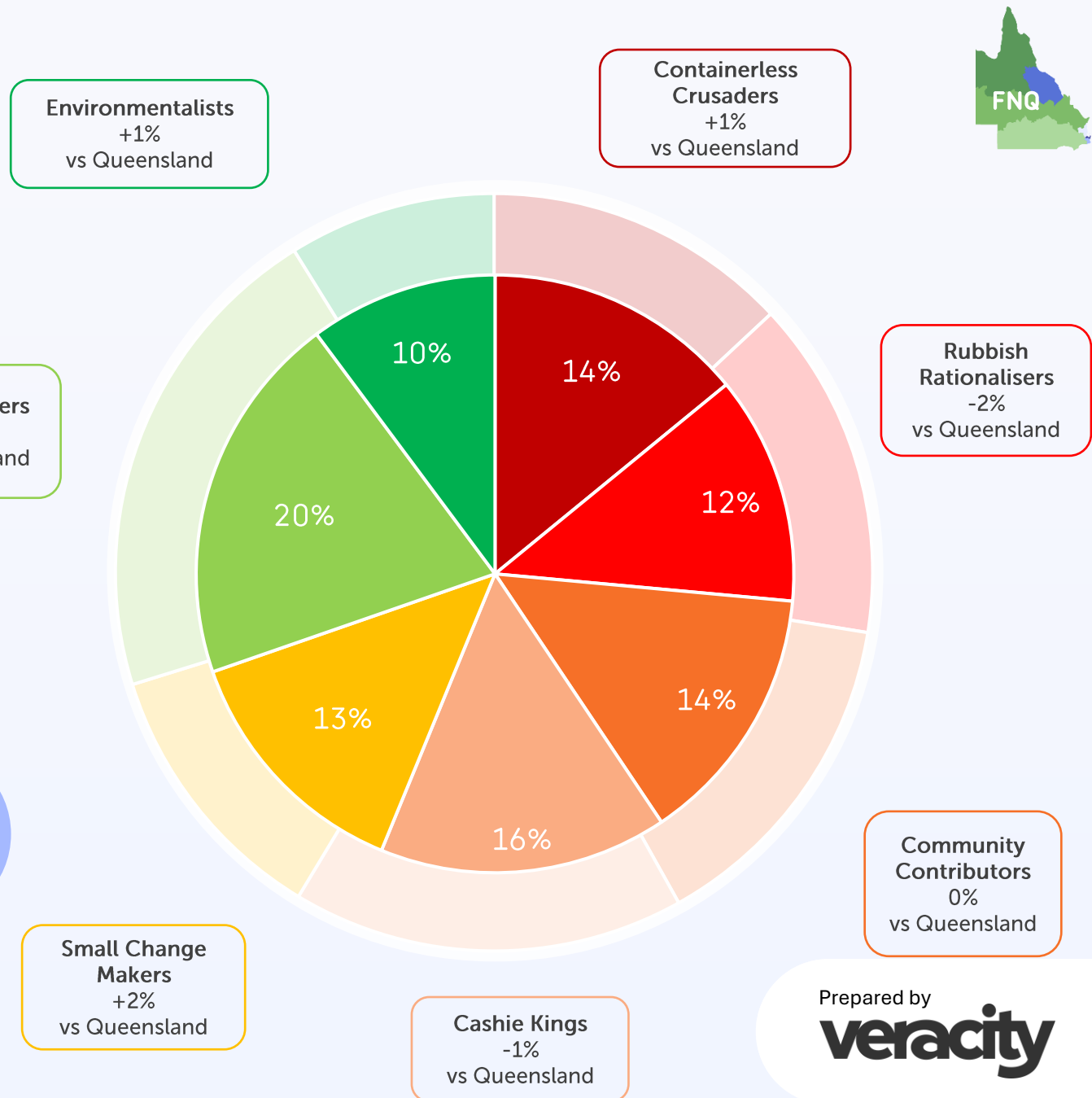
Participation Breakdown



# Customer Segments

The proportion of each segment in Far North Queensland is similar to the wider Queensland state. Just under a third of customers have no barriers to participating in the scheme.

30% have no barriers to participating

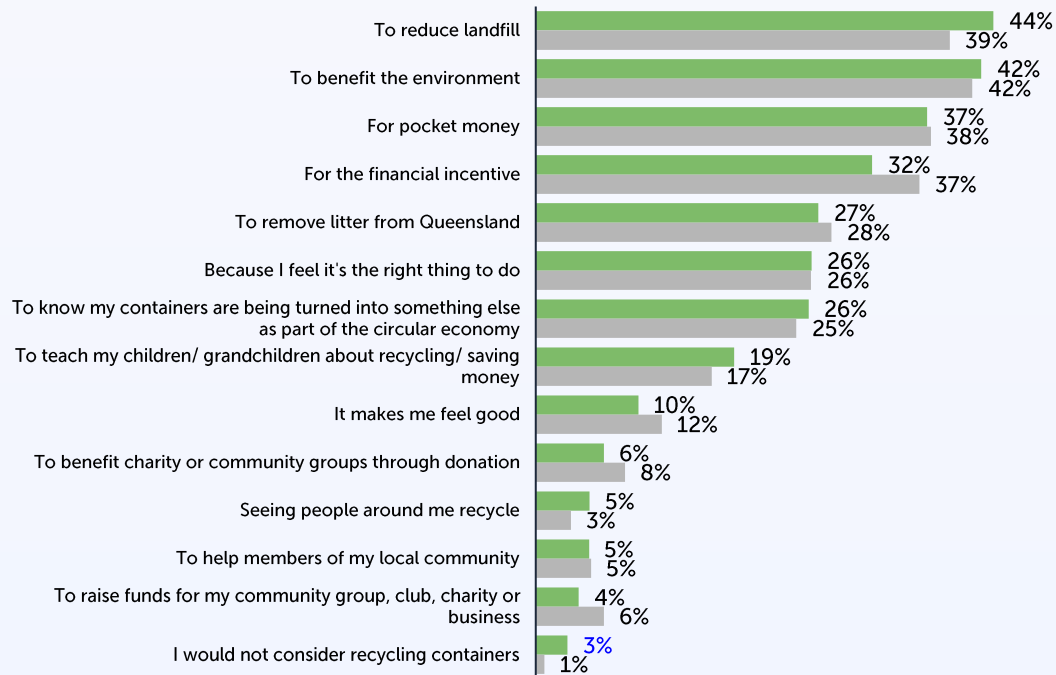




# Why do/don't people participate?

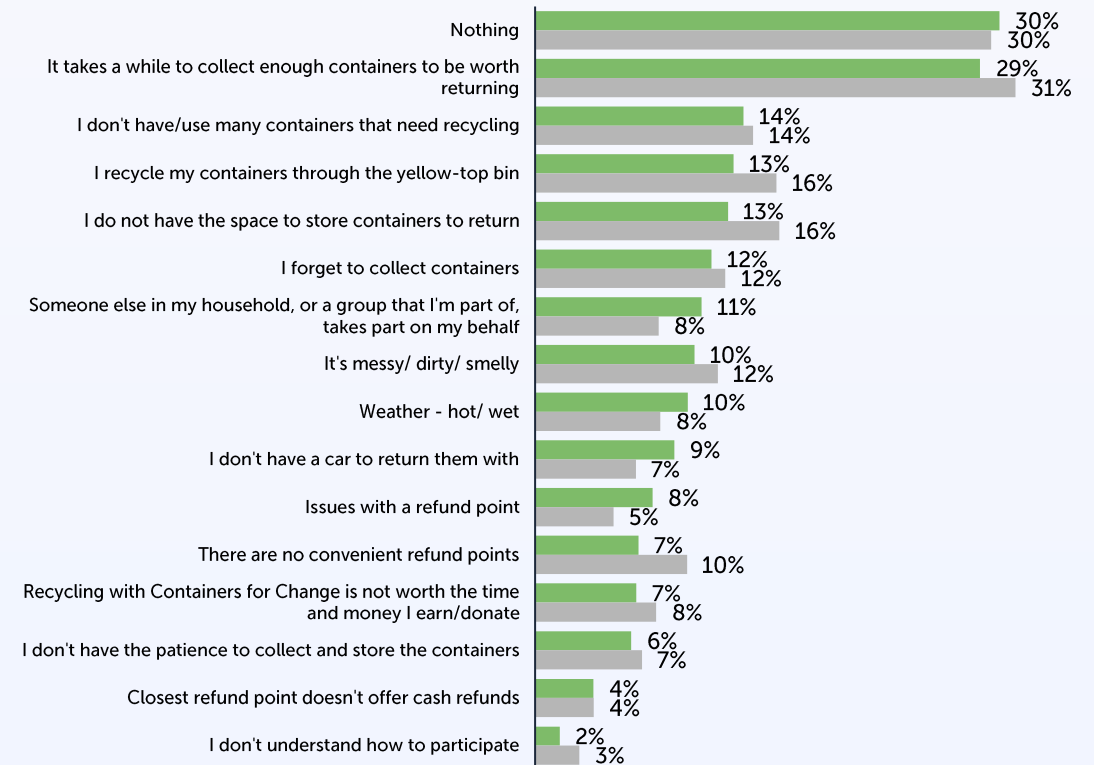
The most common participation motivation in FNQ is to reduce landfill. The biggest barrier is collecting enough.

## Motivations



■ FNQ ■ Queensland NET

## Barriers



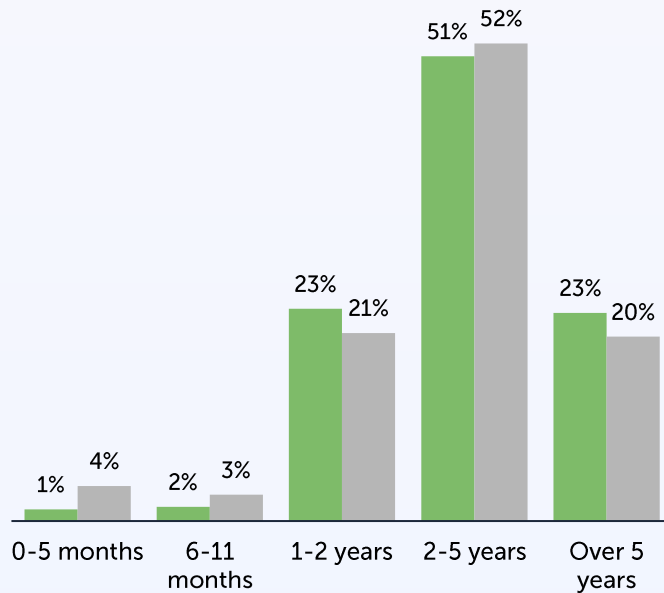
■ FNQ ■ Queensland NET



# How is the experience?

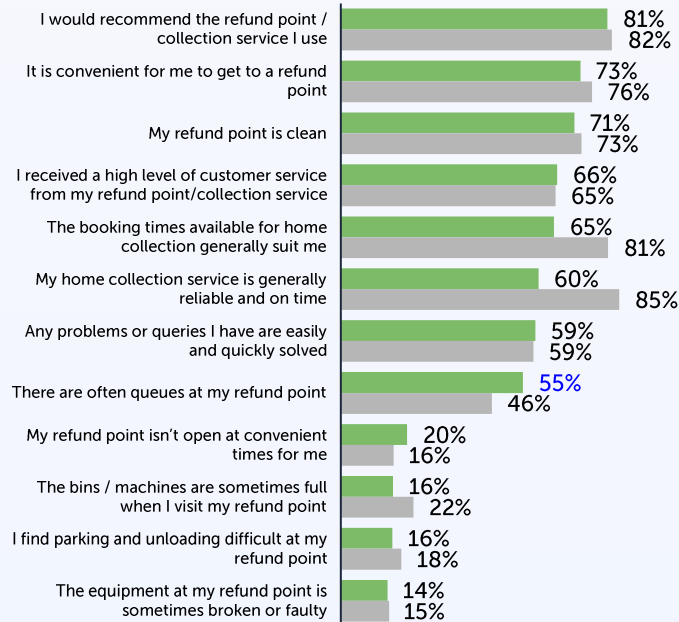
In FNQ, a significantly higher number of people experience CRP queues. Yet 4 in 5 would recommend their CRP.

## Tenure



■ FNQ ■ Queensland NET

## Experience



■ FNQ ■ Queensland NET

## Feedback

“Some locations are great but others (example mt isa) is yuck and the team dont do anything to help just watch you sort it all. Innisfail is super helpful the boys are really quick and just get it done with in minutes.”

“Easy to do at home. I don't usually keep containers when I'm away from home though”

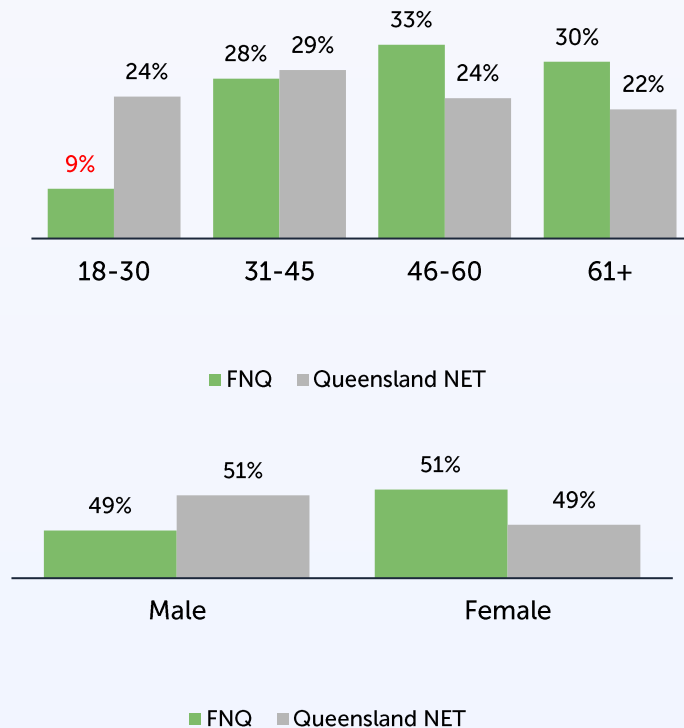
“I'm in Cairns, there's always a bottle that I don't rinse properly and it gets absolutely rancid and flyblown and ruins everything”



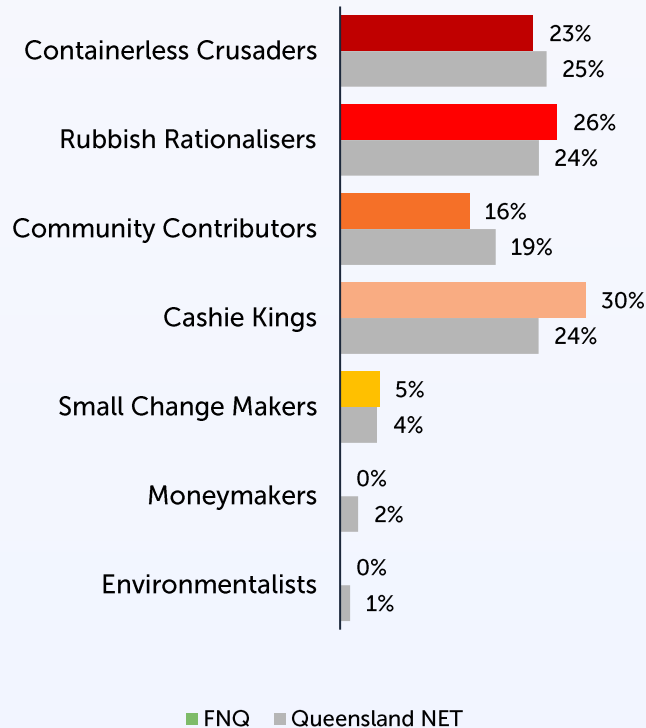
# Who is not participating?

Non-participants are older than average in FNQ, and more likely to rely on someone else to return for them.

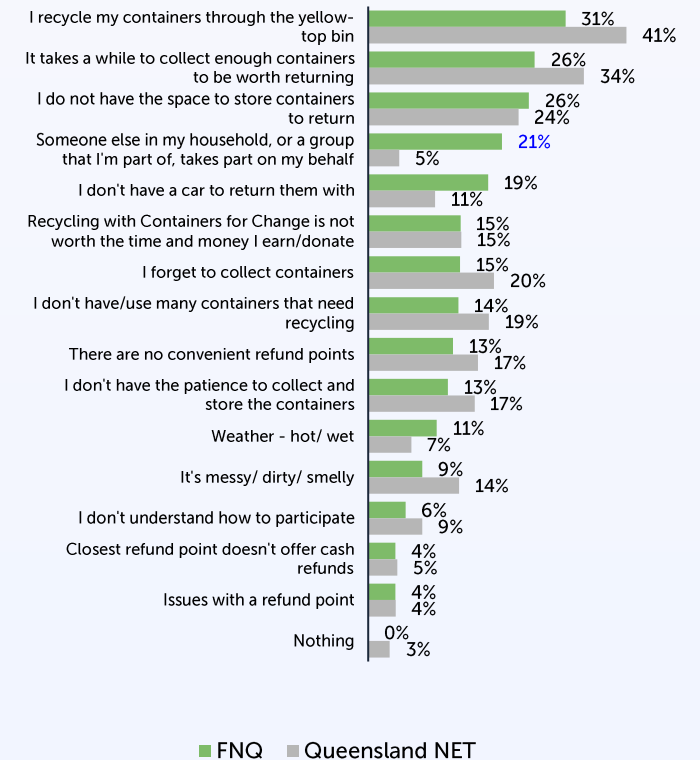
## Age & Gender



## Segment



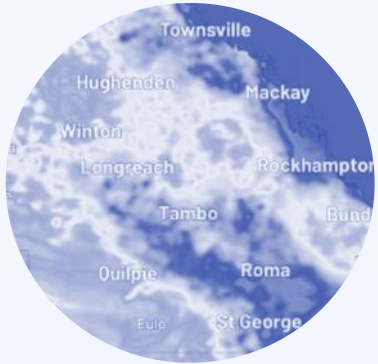
## Barriers



# Total Queensland: Executive Summary

# The wider context over summer 25/26.

The summer of 25/26 combined extreme heat (driving higher drink consumption) with widespread rain events that disrupted storage and returns, while rising living costs and fuel price spikes altered the value equation of a container return - alongside the long school holidays that shifted consumption habits and increased time spent out of home.



**Heat lifts drink consumption, rain disrupts storage and returns**



**Elevated inflation and higher festive grocery prices (notably in food and soft drink)**



**Fuel price spikes in December and January**



**Holidays shift habits and contexts for consumption**

# Summer 2025: Awareness is maxed and goodwill is strong, but the value equation is weakening - enthusiasm is slipping and friction is winning.

## How are we tracking?

| Metric                        | Jan-26 | Change last 6 months |
|-------------------------------|--------|----------------------|
| Prompted Brand Awareness      | 92%    | ▲ +1%                |
| Total Participation           | 79%    | 0%                   |
| At-home Participation         | 73%    | ▼ -1%                |
| Group Participation           | 23%    | ▼ -3%                |
| Customer Satisfaction         | 88%    | ▼ -1%                |
| NPS (Likelihood to Recommend) | 45     | ▼ -6                 |
| Ease                          | 82%    | ▼ -1%                |
| Trust                         | 79%    | 0%                   |

## What's changed?

Awareness is high, participation is stable, but enthusiasm is slipping – an early warning of future drop-off.

- People are less likely to recommend the scheme (NPS dropped beyond the expected summer dip), find collecting a little harder than returning, and increased summer volume brings niggles to the experience (mess, queues, full bins) that add friction.
- The total number of people participating is stable, but fewer of them are participating in multiple contexts – more are participating only at home.
- More containers are ending up in landfill, particularly from under 30s and from containers used out and about.
- With the scheme more mature, it is known by everyone, seen in most places and trusted by most – but because of that maturity, it is losing some of its shine, becoming more of a background chore and vulnerable to friction in the experience.

## What's holding back growth?

Inconsistency, not opposition, is holding back volume growth – containers leak into landfill when collection habits break. Growth is no longer limited by awareness, trust or understanding – it is limited by moment-level friction.

- A key issue lies in inconsistent container collection. Even with high participation rates, a significant portion of containers still end up in general waste from the less engaged and inconsistent current participants. Queenslanders feel very positively about the scheme – but still fail at the moment of collection and disposal.
- Container return challenges include queues and overflowing bins, exacerbated by seasonal summer demand.
- The perceived value equation is softening; for many, the effort does not match the reward (emotional/ transactional).
- Amongst group participants, we're lacking clear recycling leaders taking charge at the group – there is a reluctance to take responsibility.
- Across the network return points, preference doesn't always match the available CRP types.

## What's new and surprising?

Knowledge is up, but actions are down. Groups can be the multiplier – but they are declining.

- Knowledge of how to participate has reached its highest level to date, yet actions related to the scheme have declined.
- Both the number of people involved in any groups, and the number of people participating at a group, are down. Groups act as a multiplier, capturing containers from more contexts, and giving people a community motivation to be involved.
- Enquiry intent improved among people who don't participate; but it has not translated to actions among non- or existing participants.
- Advertising was very visible and memorable, with ad recall significantly increased – 2 in 3 Queenslanders saw the ads. "Bincoin" was successfully established as a new brand association, however, we saw declines in almost all other brand associations. Actions taken after seeing the ads was lower than last summer.
- News recall was low, and the inquiry did not significantly affect overall sentiment.

# What tensions do we see in the data?



**Awareness is high,  
but enthusiasm is  
slipping**

Brand awareness remained stable and advertising recall jumped sharply. Yet NPS dropped 6 points and post-ad action declined.

This suggests the system is doing a great job at being seen, but a weaker job at converting attention into conviction and behaviour. People know CfC, see it everywhere - but are increasingly unsure it's worth the effort.



**Growth isn't a  
recruitment  
problem, it's a  
collection problem**

Despite high awareness and stable participation, a third of containers still go to landfill. Among existing participants, we see inconsistency in their collection habits, especially when out and about.

This reframes the challenge from participation growth to 'how do we stop containers leaking out of an already-trusted system?' – a more operational and design-led problem than a marketing one.



**Group participation  
is shrinking, even  
though it's the  
multiplier**

This wave, group participation fell whilst at-home only participation rose.

Groups are the engine for normalising behaviour, ensuring workplace participation and creating community scale. People want to help, but don't want to be the organiser. They need social permission, not motivation. Group decline directly undermines long-term growth, even if overall participation levels look healthy.

# How are the regions alike or different?

## Similarities across regions

- Awareness and participation are broadly strong across regions, but the statewide story is that enthusiasm is slipping and friction is winning.
- The limiting factor is less “belief” and more effort at the moment of collecting/returning (queues, storage, mess, time).

## Differences across regions

- Regional QLD (esp. North Queensland and South West Queensland) is more financially motivated - participation is more sensitive to whether the return feels worth the effort.
- SEQ/coastal areas tilt more toward environment/community or “default substitutes” (yellow bin), with urban constraints like storage and convenience more prominent (esp. Brisbane South, Brisbane North, Gold Coast).
- Gold Coast is the clearest “helping others/community” skew, while Far North is strongest on landfill/environment purpose.

# So where do we focus?

## Habit

Address containers lost  
to landfill

There is significant opportunity to develop more consistent habits among existing participants, supporting and reminding them to collect and return more containers, in more places, and more contexts.

People who participate in the scheme, but don't collect every container, are more likely to put their non-collected containers in the red bin than non-participants are (who usually use the yellow bin).

Among the more engaged participants, habits break when they're away from home. Among the less engaged, their habits aren't yet as solid – many forget to collect containers.

The problem is not attitudinal resistance, its situational failure.

## Friction

Make it easier

Participants are generally very satisfied with their scheme experiences, but they do still find that collecting is a little harder than returning, and we're seeing that friction in the whole experience is starting to add up to more containers in landfill.

Participating consists of both collecting **and** returning. Summer exacerbates existing challenges: collection mess, smell and storage of increased volume; and returning suffers under increased volume with longer queues and overflowing bins.

It's more effortful to participate in summer, despite higher refunds from more containers collected.

## Purpose

Make it feel worth it

A renewed focus on the purpose of participating – remind Queenslanders of their 'why' and what the outcomes of participating are – will support a stronger emotional reward in the perceived value equation.

The reasons people participate are consistently spread across three things: the environment, their community and for money, with the less consistent segments more motivated by the environment and community benefits.

It's the mix of the emotional reward with the transactional reward that fuels the value equation.

# Further Reading

Additional Reporting Available:

- Customer Insights and Experience Report
- Marketing Impact and Planning
- Regional Member Insights



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Prepared by  
**veracity**

**No  
container**



**goes to  
waste**



**COEX**  
Container Exchange

